

Editing CMS1500 and eClaims Layout

Under the *Billing - F8* tab under a patient (make sure the patient has an insurance carrier), on the left-hand side there will be the heading *Billing Options*. Change the *Billing For:* option to *Insurance*.

The screenshot shows a software window titled "#10008 - Lewis, Arthur, h: (205)355-0143, 5/18/1948, 1:Medicare". The interface includes a menu bar with options like New, Find, Refresh, Save, Printer, Delete, Folders, Recent, Options, Alerts, and Templates. Below the menu bar are tabs for Edit - F3, Summary - F5, Charge - F6, Payment - F7, **Billing - F8**, Notes - F9, and Transactions - F10. The **Billing - F8** tab is active, showing a left-hand sidebar with various options. The "Billing Options:" section is highlighted with a red box, and the "Billing For:" dropdown is set to "Insurance". Below this, there are sections for "Insurance Billing Options" (with checkboxes for "Set Submission Date" and "Box 32 use Patient Address"), "Filters" (with dropdowns for "Charges: All", "Carrier: All", and input fields for "From:" and "To:"), and "HCFA Options" (with a "Layout:" field and buttons for "Edit Layout", "Click For Cms1500 Options", and "Reset Cms1500 Layout"). The main window area contains a table with the following data:

| TR # | DOS / | Thru DOS | Amount | Explanation | Doctor | Posted | Place | Comment | Applied | Copay | Ins1 | Ins2 | Ptnt |
|-----------------------|------------|----------|---------|-------------|--------|--------|-------|---------|---------|--------|---------|--------|------|
| - Deduct: 0, Count: 1 | | | | | | | | | | | | | |
| 29 | 12/29/2005 | | \$72.00 | 99213 | DAD | | 11 | ... | \$0.00 | \$0.00 | \$37.00 | \$0.00 | \$35 |

At the bottom of the window, there is a "Record:" field showing "1 of 1" and navigation arrows.

Now, on the bottom of the left hand list there will be a *Click for Cms1500 Options* button under the *HCFA Options* heading. Click on this button.

The screenshot shows a software window titled "#10008 - Lewis, Arthur, h: (205)355-0143, 5/18/1948, 1:Medicare". The interface includes a top toolbar with icons for New, Find, Refresh, Save, Printer, Delete, Folders, Recent, Options, Alerts, and Templates. Below the toolbar are navigation tabs: Edit - F3, Summary - F5, Charge - F6, Payment - F7, Billing - F8, Notes - F9, and Transactions - F10. The left sidebar contains several sections: "Billing Options" with a dropdown for "Insurance" and a "Click To Preview Billing Format" button; "Insurance Billing Options" with a "Policy: Primary" dropdown and checkboxes for "Set Submission Date" and "Box 32 use Patient Address"; "Filters" with dropdowns for "Charges: All", "Carrier: All", and date range fields "From:" and "To:"; and "HCFA Options" with a "Layout:" field, "Edit Layout" button, and a red-bordered button labeled "Click For Cms1500 Options". The main window area displays a table with the following data:

| TR # | DOS / | Thru DOS | Amount | Explanation | Doctor | Posted | Place | Comment | Applied | Copay | Ins1 | Ins2 | Ptnt |
|-----------------------|------------|----------|---------|-------------|--------|--------|-------|---------|---------|--------|---------|--------|------|
| - Deduct: 0, Count: 1 | | | | | | | | | | | | | |
| 29 | 12/29/2005 | | \$72.00 | 99213 | DAD | | 11 | ... | \$0.00 | \$0.00 | \$37.00 | \$0.00 | \$35 |

At the bottom of the window, there is a "Record:" field showing "1 of 1" with navigation arrows.

On the *HCFA Options* window that pops up, you will see two tabs- *Paper* and *Electronic*. Remain on the *Paper* tab for now.

Note: Using the *Electronic* tab will work the same way.

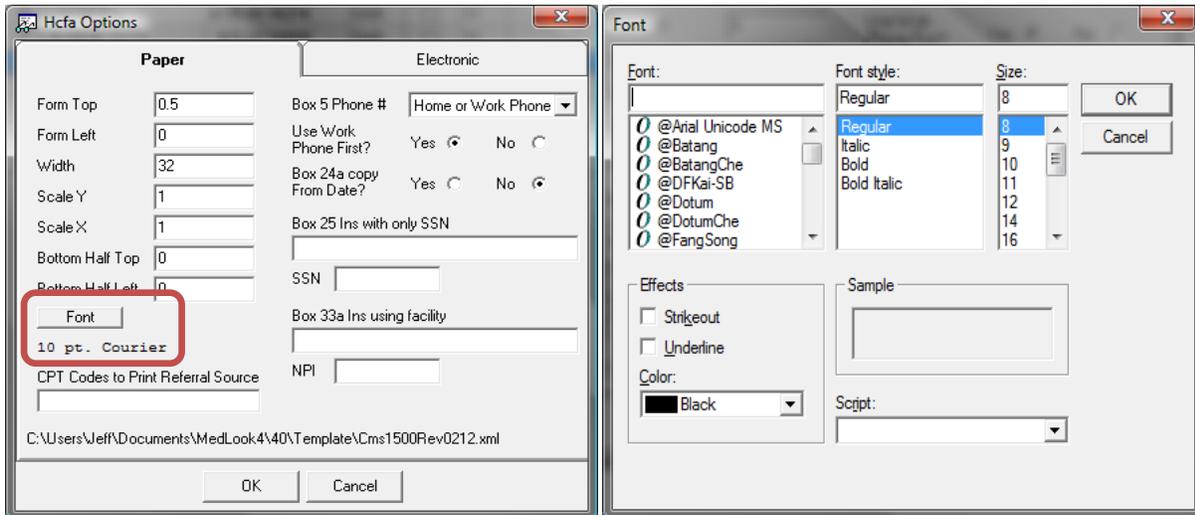
The screenshot shows the 'Hcfa Options' dialog box with the 'Paper' tab selected. The 'Paper' tab is highlighted with a red border, while the 'Electronic' tab is dashed. The dialog contains various input fields and options for form generation.

| Field/Option | Value/Setting |
|------------------------------------|--------------------|
| Form Top | 0.5 |
| Form Left | 0 |
| Width | 32 |
| Scale Y | 1 |
| Scale X | 1 |
| Bottom Half Top | 0 |
| Bottom Half Left | 0 |
| Font | 10 pt. Courier |
| CPT Codes to Print Referral Source | [Empty] |
| Box 5 Phone # | Home or Work Phone |
| Use Work Phone First? | Yes (selected) |
| Box 24a copy From Date? | No (selected) |
| Box 25 Ins with only SSN | [Empty] |
| SSN | [Empty] |
| Box 33a Ins using facility | [Empty] |
| NPI | [Empty] |

File path: C:\Users\Jeff\Documents\MedLook4\40\Template\Cms1500Rev0212.xml

Buttons: OK, Cancel

The *Paper* tab is for changing the layout of the printed CMS 1500 forms. *Form Top* shifts the information up or down. *Form Left* shifts left or right. The *Bottom Half Top* and *Bottom Half Left* type box is for adjusting the bottom half of the pages up or down and left or right. Below the *Bottom Half Left* heading is a *Font* button, so you can select the desired font for the claim forms. Underneath the *Font* button you see the text *10 pt. Courier*. This is the size and font style that is currently being used.



Note: On paper claims, everything is measured and adjusted in 0.01 inch increments. On electronic claims, everything is measured and adjusted by characters. For example, "XXX" is equal to 3.

On the bottom of the left-hand side, there is a heading *CPT Codes to Print Referral Source*. In this optional box, you may type in a procedure code and the referral source will ALWAYS print on the form. It will overwrite any used settings.

The screenshot shows the 'Hcfa Options' dialog box with two tabs: 'Paper' and 'Electronic'. The 'Paper' tab is active, showing fields for 'Form Top' (0.5), 'Form Left' (0), 'Width' (32), 'Scale Y' (1), 'Scale X' (1), 'Bottom Half Top' (0), and 'Bottom Half Left' (0). A 'Font' button is present, and the font is set to '10 pt. Courier'. The 'CPT Codes to Print Referral Source' field is highlighted with a red box. The 'Electronic' tab contains fields for 'Box 5 Phone #' (Home or Work Phone), 'Use Work Phone First?' (Yes selected), 'Box 24a copy From Date?' (No selected), 'Box 25 Ins with only SSN', 'SSN', 'Box 33a Ins using facility', and 'NPI'. The file path 'C:\Users\Jeff\Documents\MedLook4\40\T\emplate\Cms1500Rev0212.xml' is visible at the bottom. 'OK' and 'Cancel' buttons are at the bottom.

On the top of the right-hand side, there will be a *Box 5 Phone #* heading. You can select *None, Home Phone, Work Phone, or Home or Work Phone*. The next heading down is *Use Work Phone First?* Select *Yes* or *No*. The next heading down is the *Box 24a copy From Date?* Select *Yes* or *No*.

Hcfa Options

Paper

Form Top: 0.5
Form Left: 0
Width: 32
Scale Y: 1
Scale X: 1
Bottom Half Top: 0
Bottom Half Left: 0

Font: 10 pt. Courier

CPT Codes to Print Referral Source: []

Electronic

Box 5 Phone #: Home or Work Phone

Use Work Phone First? Yes No

Box 24a copy From Date? Yes No

Box 25 Ins with only SSN: []

SSN: []

Box 33a Ins using facility: []

NPI: []

C:\Users\Jeff\Documents\MedLook4\40\T\template\Cms1500Rev0212.xml

OK Cancel

The next heading is entitled *Box25 Ins with only SSN*. In the box underneath this heading, you can type in the insurance number—for example, 10008. In the next row entitled *SSN*, you will type in the doctor’s or provider’s Social Security Number. With this, it will print the SSN in *Box25* instead of the Tax I.D.

The image shows a dialog box titled "Hcfa Options" with two tabs: "Paper" and "Electronic". The "Electronic" tab is selected. The "Paper" tab contains fields for Form Top (0.5), Form Left (0), Width (32), Scale Y (1), Scale X (1), Bottom Half Top (0), and Bottom Half Left (0). The "Electronic" tab contains fields for Box 5 Phone # (Home or Work Phone), Use Work Phone First? (Yes selected), Box 24a copy From Date? (No selected), Box 25 Ins with only SSN (empty), SSN (empty), Box 33a Ins using facility (empty), and NPI (empty). The "Box 25 Ins with only SSN" section is highlighted with a red dashed border. At the bottom, there are "OK" and "Cancel" buttons. The file path "C:\Users\Jeff\Documents\MedLook4\40\Template\Cms1500Rev0212.xml" is displayed at the bottom of the dialog.

The next heading is entitled *Box 33a Ins using facility*. In this box underneath this heading, you can type in the insurance number—for example, 10008. In the next row entitled *NPI*, you will type in the doctor’s or provider’s NPI number. With this, it will print the NPI number in *Box 33a*.

The image shows a screenshot of the 'Hcfa Options' dialog box. The 'Electronic' tab is selected. The 'Paper' section on the left contains fields for Form Top (0.5), Form Left (0), Width (32), Scale Y (1), Scale X (1), Bottom Half Top (0), and Bottom Half Left (0). Below these are buttons for 'Font' and '10 pt. Courier', and a field for 'CPT Codes to Print Referral Source'. The 'Electronic' section on the right includes a 'Box 5 Phone #' dropdown menu set to 'Home or Work Phone', radio buttons for 'Use Work Phone First?' (Yes selected, No unselected), radio buttons for 'Box 24a copy From Date?' (Yes unselected, No selected), a 'Box 25 Ins with only SSN' field, an 'SSN' field, a 'Box 33a Ins using facility' field, and an 'NPI' field. The 'NPI' field is highlighted with a red dashed border. At the bottom, there are 'OK' and 'Cancel' buttons. The file path 'C:\Users\Jeff\Documents\MedLook4\40\Template\Cms1500Rev0212.xml' is visible at the bottom of the dialog.